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Lessons From Ithaka S+R on Research Practices in the Disciplines: What Have We Learned? What Should We Do?

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Abstract

It is a byword of the study of academic research that disciplines mean differences. The series of studies underway at Ithaka S+R (with library partners) shows how scholars and scientists understand “Changing Research Practices.” The project’s goal is to guide libraries toward the most fruitful forms of support for research, enhancing the scholarly workflow according to disciplinary routines and innovations. Launched in 2012, nine reports have been published thus far, with others planned or anticipated. The disciplines range from history to public health, from chemistry to Asian studies. The interview-based studies show how scholars manage their methods, and the opportunities and obstacles they face as the availability of resources in several media expand and research technologies evolve. The Ithaka S+R studies represent a unique collective portrait of scholars at work, loyal to research conventions but encountering new tools for inquiry. The reports help us understand how disciplinary habits shape expectations and experience, and what might be done to serve scholars working at change in research practices, particularly the introduction of new technologies. The reports are seen against the backdrop of views among library leaders and librarians themselves about the evolution of the liaison role, including how it can be fitted to the needs of scholars in an evolving research environment.

Introduction

The recent account by Northeastern University historian and Dean of Libraries Dan Cohen (2019) of the precipitous decline in library circulation of scholarly monographs is hardly good news for academic authors anticipating publishing one. Still, research at American universities remains strong, despite the fact that the percentage of faculty members having such responsibilities is declining everywhere. Only 30% or so of faculty members hold tenure track appointments, prompting scholars of higher education to designate today’s university as the “gig academy” (Kezar, DePaola, & Scott, 2019).

Still, there are productive scholars everywhere. And there are signs that despite complaints, even from within higher education, about too much publishing and what this means for information overload (Altbach & deWit, 2019), there is more research than ever. Consider the study earlier this year showing that young and aspirational sociologists are publishing at twice the rate they did late in the last century (Warren, 2019). Ithaka S+R’s series of studies of “Changing Research Practices” is timely and practical, and it displays confidence in the scholarly vocations at a time when surveys show uneven public and legislative support for higher education (Parker, 2019). According to Ithaka S+R: “The contexts and practices

of research in higher education are in great flux. Scholars are not only confronting new technologies that redefine every aspect of their research activity—from discovering to organizing to disseminating information—but they also must contend with the economic restructuring of the academy. As research activity evolves, so too must the services and spaces that are provided to foster those activities” (Collins & Schonfeld, 2017, p. 5).

Scholar-Centered Inquiry

Ithaka S+R has claimed a role in identifying the conditions today of scholarship and science, particularly the evolving impact of technology on all features of research. Scholars and scientists across the disciplines are striving to meet high institutional expectations for research productivity. Alas, most are unaware of the allies they have in the library to support their work. The Ithaka S+R reports are designed to probe how scholars and scientists see their research and to fortify the faculty-oriented activities of the library.

Ithaka S+R launched its series of reports in 2012, reflecting a disciplinary and scholar-centered approach to understanding how research has been changing. By now, in collaboration since 2017 with university libraries, Ithaka S+R has studied researchers

in nine fields: history (2012), chemistry (2013), art history (2014), religious studies (2017), agriculture (2017), public health (2017), Asian studies (2018), civil and environmental engineering (2019), and indigenous studies (2019)—and more are planned. Viewed together, the reports represent a unique collective portrait of scholars and scientists at work, loyal to conventions but encountering new tools, often requiring assistance in using them. The studies codify what is on the minds of researchers and how librarians can help them to overcome impediments to what they want to achieve, from discovery to dissemination. In effect, Ithaka S+R challenges the view, often expressed in the studies themselves, that scholars have little to learn from librarians.

The studies help us understand how disciplinary habits shape professional expectations and research practices, and what might be done to serve scholars taking different positions about technological innovation, from indifference to enthusiasm. There is the need for capitalizing on new opportunities for discovery, information and data management, collaborating in and across disciplines, identifying and reaching varied audiences, meeting open access mandates, gathering and interpreting impact metrics, and addressing other features of the scholarly workflow. Librarians themselves acknowledge the problem of establishing professional relations with scholars and scientists to strengthen research practices (Arendt & Lotts, 2012). But Ithaka S+R looks to make the view of an engineer more common: “When you go to [the library] and talk with [librarians], you know that the goal is trying to help you” (Cooper & Springer, 2019, p. 15).

Disciplinary and Conversational Knowledge

Of course, Ithaka S+R’s periodic national surveys (e.g., Blankstein & Wolff-Eisenberg, 2019) offer timely signs of how scholars think about their work. But the studies of “Changing Research Practices” are organized by discipline and very deliberately “scholar focused,” meaning that we hear from scholars themselves about their work. That is reflected in the interviews making up the primary data for the studies. In the early studies Ithaka S+R staff did the interviewing themselves. Since the study of religious studies scholars (2017), academic librarians have collaborated with Ithaka S+R by conducting local interview-based projects. From these reports Ithaka S+R builds a study summarizing the results thematically, citing many participating scholars, and offering

discipline specific recommendations for libraries and librarians in supporting research.

The Ithaka S+R reports are timely and valuable in several ways, and they are widely used (with over 3,000 downloads each for the two latest reports, in 2019, on scholars in civil and environmental engineering and indigenous studies. The reports are, as Ithaka S+R puts it, “scholar-centered,” and while researchers sometimes speak about their interactions with librarians, the library itself has not (since 2017) been a subject in interview protocols. The discipline-by-discipline focus features researcher experience.

Disciplines define and maintain research practices for scholars (Becher & Trowler, 2003) but also make demands on subject or liaison librarians, particularly via subdisciplinary projects reflecting the specialization of most academic research. Thus, a religious studies scholar may teach the subject broadly but conduct research on, for example, liturgy and ritual in one or more religions, or how a faith is practiced and understood geographically or sociologically. Similarly, scholars in the other Ithaka S+R disciplines define themselves professionally, and for the academic reward system, as specialists with knowledge far beyond what is reasonable to expect among librarians.

Still, the disciplinary focus has been crucial to organizing the Ithaka S+R studies, recruiting participants, and learning about research practices reflecting “what scholars do” (Jaguszewski & Williams, 2013). That can include how professional habits are coming to resemble domestic ones. Thus, “Researchers’ expectations are being set not by improvements relative to the past but rather by reference to consumer internet services that enable our use of multiple devices anywhere and effective switching between them” (Schonfeld, 2015, p. 2). The disciplinary approach allows for more focus and then scale. As Anne Kenney (2014) urges, it means being “able to move from one-offs to impacts at the department or disciplinary level” (p. 7).

Another feature of the Ithaka S+R studies that makes them timely and valuable is the record they are building that reflects what scholars already do and what they hope to do in adapting to the evolving digital dimension of research. Ithaka S+R itself (as noted above) conducts periodic faculty surveys that ask about uses of and attitudes toward technology. The website and news source *Inside Higher Education* and

the IT service organization EDUCAUSE also conduct surveys. But the “Changing Research Practices” studies are unique in their method: patient, open ended, face-to-face interviewing. As of mid-2019 Ithaka S+R had worked with 194 librarians at 102 research libraries. Hundreds of scholars have been interviewed. Such campus interactions can yield durable professional relationships. The Ithaka S+R studies are also prompting formal attention to questions of scholarly communications in disciplinary journals (e.g., Hanneke & Link, 2019; Williams et al., 2019).

In effect, the Ithaka S+R interviews stand for customizable relations between librarians, typically those designated liaisons, and the faculty, signs of the benefits of treating scholars personally (Bales, 2015). The conversational approach to learning about and contributing to the research experience is part of the “Reimagining the Library Liaison” project at the Association of Research Libraries (2019) and named at a recent ARL conference as “Talking So Faculty Will Listen, Listening So Faculty Will Talk.” In this case, conversation is a research practice that joins scholars’ disciplinary routines and needs with what must be known by the librarian researchers for well-targeted library services.

“I Should Be More Organized”

What have we learned from the Ithaka S+R studies? In a word: many scholars would welcome help. As an Asian studies scholar admitted: “I don’t think there is currently a very good mechanism to tell me what has been published out there that is useful.” Another said to a librarian interviewer, “I need someone who can stand over my shoulder and say, ‘Do not read these things, okay? Look at these other things’” (Cooper & Daniel, 2018, p. 11).

The studies are written to show what libraries can offer. There are expressions of widely shared needs named in virtually all of the studies: requests for better search and discovery tools, training for managing documents and data, guidance in navigating open access options, and assistance in broadening the audience for academic research. And there are particular ones: training in navigating non-English search platforms (Asian studies), supporting endangered archives at institutions lacking funding and staff (religious studies), improving citation management software to include primary sources (historians), and encouraging the uses of preprints for keeping up with research (public health).

Plainly, there is no formula for research satisfaction and success but the Ithaka S+R studies show that all scholars hope to manage an ever increasing array of digital tools and the research resources they yield. Thus, there is this summary statement in the first of the studies, on historians, “The majority of interviewees said that a central challenge of their research is ‘gaining intellectual control’ over the content they have collected throughout their research process. From the interviews, it was clear that historians are interacting with a wide ecosystem of information, within which they are continuously collecting, interpreting, and attempting to organize and access for analysis. Nearly all historians face an ever-growing mass of paper and electronic resources, notes, writing and images. Organizing these materials in a consistent way so that they can be easily accessed throughout the research and writing process—typically over many years—is an enormous challenge” (Rutner & Schonfeld, 2012, p. 40). The Ithaka S+R researchers actually observed historians “creating and revising and struggling with their organization systems.” The prevailing sentiment in interviews was “I should be more organized” (Rutner & Schonfeld, 2012, p. 40).

Subsequent Ithaka S+R studies use the familiar vocabulary of “information management” to signify this widely shared research problem. Scholars manage resources according to their preferences. If there is a term to describe research practices across the disciplines it is “idiosyncratic.” Thus, “The efficacy of agriculture scholars’ personal information systems depends on their own ability to design and manage them” (Cooper, 2017, p. 19).

Plainly Ithaka S+R recognizes as much even while all scholars anticipate the effects of the digital age for research: “We help academic and cultural communities know what is coming next, learn from rigorous and well-designed research studies, and adapt to new realities and opportunities” (Ithaka S+R website). It was technological momentum that prompted optimism about what could be remade in research practices: “Technologies have been changing academic research and teaching for years. In many academic fields, changing research methods are re-shaping the very nature of the types of research questions that scholars are able to pursue and the rigor with which they can address them. And, even when underlying research methods remain constant, day-to-day research practices are digitally enabled, a transformation that has had in some cases

substantial implication for the substance of scholarly research” (Rutner & Schonfeld, 2012, p. 4).

“Researcher Experience” and Liaison Librarians

When scholarly communications consultant Lettie Conrad (2019) called recently for more attention to the “researcher experience” she highlighted (without actually mentioning them) the role of the Ithaka S+R studies in efforts at libraries to better understand the role of the subject matter, or liaison librarian. The key to doing so, for many who study library services, is in probing the circumstances and activities of scholars and scientists. Mindful of the organizational tasks facing libraries at a time of considerable technological change, Conrad makes knowledge of the faculty central: “Information user research generates the insights and inspiration that fuels the evidence-based decisions that drive our institutions forward (or not). An investment in our awareness of and compassion for research information practices requires the same well-considered, methodical approach as any other expenditure.”

The Ithaka S+R studies contribute, via qualitative interviewing, to the “metrics” libraries can use in planning for librarian roles and estimating the effectiveness of service to research. What “expenditures” are more important than those in the library’s professional staff and at research universities particularly in “working knowledge” of the activities of scholars and scientists? Indeed, with changes in library services reflecting the increasingly digital research ecosystem, there has been considerable recent attention to the roles of the subject or liaison librarian, those with the most direct relation with faculty research practices, or the “research experience” (e.g., Church-Duran, 2017; Hoodless & Pinfield, 2018).

Ithaka S+R itself had recognized that “An emerging theme in the development of the liaison model is to shift the focus away from the work of librarians to that of scholars and to develop engagement strategies based on their needs and success indicators” (Kenney, 2014, p. 4). Accordingly, in an allied statement of professional change, an “engaged liaison seeks to participate in the entire lifecycle of research” (Jaguszewski & Williams, 2013, p. 4). The goal is to focus on what scholars and scientists do rather than on the traditional roles of the librarian. That often means working at the point where subject specialization and more general functional abilities

meet, so called “hybrid” identities for liaisons working autonomously or as brokers (of a kind) in guiding scholars and scientists toward the services they need. But responsibility remains, as reflected in the Ithaka S+R studies, for attention to what yields achievement in research. In the best organizational circumstances, the liaison librarian has a role in the response to this question: “What does the library do that promotes academic productivity and is it the most effective and efficient way to achieve that end” (Kenney, 2014, p. 11).

“Satisficing” and Unofficial Research Experience

The prevailing mood in identifying roles for digital technology in teaching and research in higher education is that of inevitability. Still, it is often said of our postsecondary institutions—chiefly about the faculty—that they are reluctant to change (Tagg, 2019). But just how much determination there is among scholars to make substantial changes in research practices is a question University of California higher education researchers asked in their Mellon Foundation-funded studies from 2005 to 2010. Diane Harley (2013), who directed the project, urged recognition of the limits of digital “transformation” with scholars and scientists in the 12 disciplines Berkeley studied, fields largely loyal to traditional norms and practices.

Similarly, University of Kansas librarians, looking to stay close to the “street beat” in their studies of research practices in the social sciences and STEM, found that “Learning or incorporating new skills and practices into their work flows seemed nearly impossible, no matter how potentially beneficial or necessary. When conducting their own research, faculty report that they may ‘satisfice’ if a less than ideal solution appears more efficient” (Monroe-Gulick, Valentine, & Brooks-Kiefer, 2017, p. 797).

By now, most scholars, and even ambivalent ones, are prepared to accept some level of technological adaptation—how would research be possible without online journals?—but, as in all other matters, attitudes and practices vary, often reflecting long-term scholarly practices. The report on Asian studies scholars (Cooper & Daniel, 2018) acknowledged that despite the convenience digitization offers for research basics, many still prefer to read and take notes by hand because they “[find] it more intuitive to scribble as [they] read.” Habits aside, in some of the Ithaka S+R studies there are surprisingly low levels of digital experience or sophistication. But

there is always a willingness to learn, giving weight to the “recommendations” at the end of each report and to prospects for “reimagining” the roles of the liaison librarian. The lessons can also be learned at institutions that, on their own, study local research practices according to the model used by Ithaka S+R (e.g., Hendrix, 2019).

Habits reign in research practice, including some that appear only rarely in the Ithaka S+R studies even while researchers across the disciplines will recognize themselves in the interview data. Probing the “street beat” can also take us to common if unofficial (so to speak) practices that may not gain attention in the Ithaka S+R interview formula. For example, the sociologist Andrew Abbott (2014), who studies libraries and research traditions, writes candidly about what is behind his successful methods of inquiry. He acknowledges the role of improvisation in research, or moving in and around resources as memory, association, and curiosity dictate. In effect Abbott endorses what another Ithaka S+R study characterizes as “brainwork,” or the unplanned habits of mind that give direction to research (Tancheva et al., 2016). In an allied admission about his practices, Abbott also recognizes the uses of browsing, essential to expert work in the library or online. The research workflow should allow for “productive confrontation” with unexpected resources (see also McKay et al., 2019).

Conclusion: Small Wins

According to Conrad (2019), “A robust cycle of end-user investigations should underlie the experiments in products and services that will define future transformations across the scholarly communications landscape.” Such inquiry may well show change if without transformation. The sociologist Karl Weick (1984) proposed “small wins” as a most suitable strategy for organizations eager to change but wary of unrealistic expectations. “People often define

problems in ways that overwhelm their ability to do anything about them. . . . To recast larger problems into smaller, less arousing problems, people can identify a series of controllable opportunities of modest size that can produce visible results and that can be gathered into synoptic solutions. . . . Small wins induce a degree of certainty that allows greater access to the very resources that can insure more productive outcomes” (pp. 40, 46).

Librarians cannot be all things to all people—or meet all of the obligations named in the Ithaka S+R studies. Although library leaders are necessarily focused on their institutions’ priorities and services that will scale, a focus on scale, at least at the outset, is contrary to the potential in scholar-focused liaison work. Liaisons can embrace idiosyncrasy, aiming simply to meet scholars where they are. Library leaders can make room for small wins—and in smaller institutions, a small win may lead to a larger win. When an institution only has a handful of prominent scholars, a small win in the service of an individual researcher may also call attention to the library’s efforts to support larger organizational goals in research and grant funding. Even though recent reports encourage rethinking the liaison’s role in working with scholars, liaison librarians can make connections every day to contribute to “changing research practices.” Whatever their recent indifference to the library, scholars are increasingly prepared to welcome research colleagueship. It was an Asian studies scholar who told Ithaka S+R interviewers that with so much to do in research, and with so many changing practices to recognize, “each scholar in their field is a kind of mini-librarian” (Cooper & Daniel, 2018, p. 21).

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